



## ***San Francisco Bay Area Conservancy Program***

### **GRANT APPLICATION INFORMATION, FORM, AND EXHIBITS *Updated November 2003***

The Coastal Conservancy announces the availability of grants to government agencies and nonprofit organizations in order to meet the goals of the San Francisco Bay Area Conservancy Program.

#### ***Introduction***

The San Francisco Bay Area Conservancy Program (Bay Program), administered by the Coastal Conservancy, was established in 1998 to address the natural resource and recreational goals of the nine-county Bay Area in a coordinated and comprehensive way (Division 21 of the California Public Resources Code, Chapter 4.5). The Conservancy may award grants to help achieve the following Bay Program goals:

- (1) protect, restore, and enhance natural habitats and other open-space resources of regional significance throughout the nine-county area;
- (2) improve public access and related facilities to and around the Bay, its surrounding hills, and the coast, through completion of bay, coast, and ridge trails that are part of a regional trail system; and
- (3) promote projects that provide open space that is accessible to urban populations for recreational and educational purposes.

The Conservancy works in partnership with the Bay Area Open Space Council, the San Francisco Bay Joint Venture, and other entities on an on-going basis to identify specific long-term resource and recreational goals for the region. Projects that meet programmatic and regional goals are further prioritized for their relative strength in meeting the Conservancy's "Project Selection Criteria and Guidelines" and the following criteria (established in Chapter 4.5):

- (1) Are supported by an adopted local or regional plan;
- (2) Are multi-jurisdictional or serve a regional constituency;
- (3) Can be implemented in a timely way;
- (4) Provide opportunities for benefits that could be lost if the project is not quickly implemented; and
- (5) Include matching funds from other sources of funding or assistance.

## ***Applying for Grants***

### **Application Form**

Application forms may be obtained through e-mail, regular mail, or from the Conservancy's website at [www.scc.ca.gov](http://www.scc.ca.gov). All applications submitted must include photos and maps. Most applicants should submit all pages of the application form, but in the following circumstances a partial application (all pages up to the "Additional Questions" section) may provide sufficient information: (1) Conservancy staff is already involved in or is very familiar with the project, or (2) the project was previously submitted and all that is needed are updates of budgets, schedules or other details related to the project. *Prospective applicants are advised to discuss their projects with Conservancy staff prior to submitting applications.*

### **Questions about the application process or specific projects may be directed to:**

Nadine Hitchcock  
Manager, San Francisco Bay Area Conservancy Program  
Telephone: (510) 286-4176  
E-mail: [nhitchcock@scc.ca.gov](mailto:nhitchcock@scc.ca.gov)

### **Submit applications to:**

Tim Corrigan  
San Francisco Bay Program  
Coastal Conservancy  
1330 Broadway, 11<sup>th</sup> Floor  
Oakland, CA 94612

### **Continuous Submission Dates**

Proposals will be accepted on a continuous basis.

### **Number of Copies**

Please submit five copies of the completed application form, including all exhibits.

### **Preliminary Project Review and Selection Process**

The project review and selection process begins with staff reviewing and ranking applications based on their relative regional significance, consistency with the "San Francisco Bay Area Conservancy Program Screening, Programmatic and Evaluation Criteria" (Exhibit A, attached), the Conservancy's "Project Selection Criteria and Guidelines" (Exhibit B, attached), and with the purposes of available or soon-to-be available funding sources (currently Propositions 40 and 50).

Staff may also solicit input from individuals and/or technical experts with pertinent expertise from other governmental agencies, non-profit organizations, and other entities. Priority will be given to projects with matching funds. Applicants may be contacted to provide additional information during the review process.

Projects selected will be divided into two tiers (Tier 1 and Tier 2) to differentiate readiness, certainty of project details, and to inform Conservancy staff and others about priorities for allocation of staff resources. Applicants will be advised of staff ranking as soon as staff is able to complete the review process.

**Tier 1** includes candidate projects that are judged to best fit Bay Program goals and are ready to implement within one year. If projects on this list are ready to go but the applicant needs more funds than the Bay Program is able to offer, Bay Program staff may (subject to availability of staff time) work with the applicant to try to find additional funds.

**Tier 2** includes candidate projects that are high priority but are still under development and likely to be ready for funding during the next 1-2 years. Tier 2 projects will be assigned a Coastal Conservancy project manager as soon as possible to help with project development.

### **Conservancy Board Approval**

Projects selected for the Tier 1 and 2 lists are subject to Coastal Conservancy Board approval of the staff recommendation. The Board meets six to eight times a year in varying locations around the state. Conservancy staff recommendations to the Board are finalized approximately one month prior to each Board meeting. Applicants are required to provide staff with all pertinent information in a timely manner to ensure Board consideration at any particular meeting. See attachment titled *Applying and Meeting Requirements for Coastal Conservancy Grants: Supplementary Information* (Exhibit C) for additional details.

### **Funding Agreement**

Upon Board approval grantees enter into an agreement with the Coastal Conservancy. This agreement describes the terms and conditions for Conservancy funding. Grantees should note that funding may only be provided to reimburse expenses incurred by grantees *after* execution of their contractual agreement with the Conservancy.

The agreement will require grantees to furnish supplemental information in addition to that provided in the grant application. The “*Meeting Grant Requirements Supplementary Information Sheet*” (Exhibit C) outlines the kinds of additional information that will be required and the Conservancy’s process and usual timeline for completing agreement documentation. Specific supplemental information needed will vary by type of project.

Please note, in particular, that the agreement will require a resolution from the applicant’s governing body containing the following: (1) authority to submit the proposal; (2) authority to enter into a contract with the Conservancy; and (3) designation of the applicant’s authorized representative. This resolution may be submitted after the application form, but if the applicant’s governing board meets infrequently and the proposed project needs to begin very soon, it is advisable to schedule the request for the resolution early in the application process.

### **Grant Amounts and Available Funding: Propositions 40 and 50**

There are no established minimum or maximum grant amounts. The Coastal Conservancy will base the size of awards on project needs, benefits and competing demands for funds within the region.

Currently, projects may receive funding from one of two voter-approved bond funds: Proposition 40, “The California Clean Water, Clean Air, Safe Neighborhood Parks and Coastal Protection

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Act of 2002” or Proposition 50, the "Water Security, Clean Drinking Water, Coastal and Beach Protection Act of 2002." Over the next several years, subject to legislative appropriation, the Conservancy expects to spend \$40 million from Proposition 40 and \$20 million from Proposition 50 in the San Francisco Bay region. Additional funds may be available for the region from these bond measures from other Coastal Conservancy accounts and from the California Wildlife Conservation Board. The text of Propositions 40 and 50 may be found at [www.leginfo.ca.gov](http://www.leginfo.ca.gov) (Prop. 40 is under the Division 5, Chapter 1.696 of the Public Resources Code and Prop. 50 is under Division 26.5 of the Water Code).

**Eligible Applicants**

Government agencies (federal, state, local, and special districts) and certain nonprofit organizations are eligible for funding. Eligible nonprofit organizations must exist under the provisions of Section 501(c)(3) of the Internal Revenue Code. As a result of recent legislation, eligibility of nonprofit organizations is defined by whether an organization's articles of incorporation (and IRS letter) demonstrate that the organization's purposes are consistent with Division 21 of the Public Resources Code, the Coastal Conservancy's enabling legislation.

**Eligible Activities**

The Bay Program may fund property acquisition and project planning, design, and/or construction in accordance with Chapter 4.5 of Division 21 of the Public Resources Code. Research, assessments, and environmental education activities will only be considered when tied to on-the-ground projects. In addition, projects must be consistent with the purposes of the funding source. Current sources are summarized below.

Proposition 50 is generally for projects that protect and restore wetlands and watershed lands in San Francisco Bay. In addition Proposition 50 requires a portion of the bond funds be allocated to projects for the acquisition and development of nature centers, training and research facilities to promote public access to and participation in the conservation of land, water, and wildlife resources.

Proposition 40 may be used for projects that implement the goals of the San Francisco Bay Area Conservancy Program. Special provisions of this proposition include a commitment of matching funds. Preference will be given to applications with monetary rather than property or service contributions.

***California Conservation Corps***

The Coastal Conservancy encourages all applicants to consider using the California Conservation Corps for construction projects. Corps contacts in the Bay Area are:

Napa Satellite Operation (Marin, Sonoma, and Napa counties)

Chris Sauer, Conservation Supervisor (707) 253-7783

Richmond and Mid-Bay Satellite Operation (Solano, Contra Costa, and Alameda counties and Santa Clara, San Mateo, and San Francisco counties respectively)

Lynn Favaro, Conservation Supervisor (707) 562-3520



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**GRANT APPLICATION**

**APPLICANT INFORMATION**

Applicant name (organization) \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contact name \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

For nonprofit organizations, Federal Tax ID# \_\_\_\_\_

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**PROJECT INFORMATION**

Project title \_\_\_\_\_

Project location: City \_\_\_\_\_ County \_\_\_\_\_

Street \_\_\_\_\_ Cross street \_\_\_\_\_

Proposed starting date \_\_\_\_\_ Estimated completion date \_\_\_\_\_

**Project Elements** Check one or more, if applicable.

- ☐ San Francisco Bay Trail or connections
- ☐ Bay Area Ridge Trail or connections
- ☐ California Coastal Trail or connections
- ☐ Trail connections between population centers and public facilities
- ☐ Recreational facilities
- ☐ Acquisition of land for recreation/education

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- ☐ Acquisition of land for habitat protection or restoration
- ☐ Acquisition to protect agricultural land
- ☐ Watershed protection
- ☐ Restoration or enhancement of natural habitats or connecting corridors
- ☐ Education projects or facilities
- ☐ Other \_\_\_\_\_

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**Funding Request**

Funding amount requested: \_\_\_\_\_

Month and Year funding needed to start project: \_\_\_\_\_

**Matching funds (not including in-kind):**

\$\_\_\_\_\_ Source \_\_\_\_\_ Expected commitment date: \_\_\_\_\_

\$\_\_\_\_\_ Source \_\_\_\_\_ Expected commitment date: \_\_\_\_\_

\$\_\_\_\_\_ Source \_\_\_\_\_ Expected commitment date: \_\_\_\_\_

\$\_\_\_\_\_ Source \_\_\_\_\_ Expected commitment date: \_\_\_\_\_

\$\_\_\_\_\_ Source \_\_\_\_\_ Expected commitment date: \_\_\_\_\_

\$\_\_\_\_\_ Source \_\_\_\_\_ Expected commitment date: \_\_\_\_\_

**TOTAL PROJECT COST:** \_\_\_\_\_

**Matching funds: In-kind**

In-kind contributions include volunteer time and materials, bargain sales, and land donations. Please describe and estimate value, and differentiate between expected in-kind contributions and contributions (work or other types of contributions) already obtained/completed.

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**Preliminary Budget**

In the budget matrix below, list the major tasks of the proposed project and indicate the estimated cost of each. These tasks should correlate with the activities you will list on the following page under "Timeline" (in some cases, several tasks listed here may logically be grouped as one activity in the timeline matrix). Show the source of funding for each task. A simplified example is provided.

*Simplified Sample Budget*

Task Number	Task	Applicant's Funding	Coastal Conservancy	Other Matching Funds	Total Cost
1	Complete Final Designs	\$20,000	\$30,000	\$7,000	\$57,000
2	Complete CEQA	\$5,000			\$5,000
3	Obtain Permits	\$5,000			\$5,000
<b>Total</b>		\$30,000	\$30,000	\$7,000	<b>\$67,000</b>

**Preliminary Budget**

Task Number	Task	Applicant's Funding	Coastal Conservancy	Other Matching Funds	Total Cost
<b>Total</b>					



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**Timeline**

Please list (1) all significant and pertinent project milestones related to project for which funds are being requested (for example, California Environmental Quality Act compliance, obtaining of permits, appraisal preparation and other land acquisition documents, commencement of construction, and project completion), (2) expected dates for reaching or completing those steps, and (3) any factors that could influence the timely implementation of the project.

***Simplified Sample Timeline***

ACTIVITY	COMPLETION DATE	FACTORS THAT COULD INFLUENCE TIMELY IMPLEMENTATION
Complete Final Designs	Nov. 2003	Lack of agreement on design
Complete CEQA	March 2004	Unanticipated impacts
Obtain Permits	April 2004	Delays in issuing of permits

**Timeline**

ACTIVITY	COMPLETION DATE	FACTORS THAT COULD INFLUENCE TIMELY IMPLEMENTATION

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**Project Description** Provide a clear, detailed description of project proposed for Conservancy funding at this time, and a general context of the overall larger project. Please limit description to one page or less.

## **REQUIRED MAPS AND PHOTOS**

All applications must include one or more clear photos of the project site and at least two reproducible (8.5 by 11) maps. To ensure maps and photos are sufficiently clear, please do not send photos or maps by facsimile. The two maps should show the project location at regional and site scales.

- The regional map will clearly identify the project's location in relation to prominent area features and significant natural and recreational resources, including regional trails and protected lands.
- The site-scale map will show the location of project elements in relation to natural and man-made features on-site or nearby.

## **ADDITIONAL QUESTIONS**

These questions will help us evaluate the consistency of proposals with Bay Program goals (see goal summary on page one of Grant Application Information, Exhibit A, and Exhibit B). Attach a separate page if necessary, but please keep responses brief.

1. Describe how the project is supported by, consistent with, or in conflict with any applicable local or regional plans. Identify the pertinent plan(s).
  
  
  
  
  
  
  
  
  
  
2. What public agencies, non-profit organizations, and other entities and individuals support the project and why?

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3. Describe the regional significance of the project with respect to recreation and natural resources and how the project serves a regional constituency. Does it involve multiple jurisdictions? Describe enhancement or protection of listed species, high priority habitat and connecting corridors, agricultural lands, watersheds, or trails.

4. What project opportunities or benefits could be lost and why if the project is not implemented in the near future?

5. Describe any innovative components of the project and how the innovation meets the goals of the San Francisco Bay Area Conservancy Program.

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6. Is the project related to any previous or proposed Coastal Conservancy projects? If so, which ones and how are they related?

7. Applicants proposing construction projects are urged to consider using the California Conservation Corps. If your project involves construction, please indicate whether you have contacted the Corps regarding your project and the results of that contact.

8. Projects that involve acquisition of property ***must*** involve a willing seller. If your project includes property acquisition, please describe the status and expected conclusion of landowner negotiations.



## ***San Francisco Bay Area Conservancy Program***

### **General Screening, Programmatic, and Evaluation Criteria**

#### **Screening Criteria**

To be eligible for funding or other assistance through the San Francisco Bay Area Conservancy Program, projects must meet the following requirements:

- A. The project must be located in one or more of the nine Bay Area counties (San Francisco, San Mateo, Santa Clara, Alameda, Contra Costa, Solano, Napa, Sonoma and Marin)
- B. The project must help achieve one or more of the following four goals, and further comply with the noted qualifications:
  - 1. To improve public access to and around the bay, coast, ridgetops, and urban open spaces, through completion and operation of regional bay, coast, and ridge trail systems, and local trails connecting to population centers and public facilities, and through the provision and preservation of related facilities, such as interpretive centers, picnic areas, staging areas, and campgrounds.

#### **Further Qualifications:**

- a) Trail projects must be part of a regional trail system, which includes both major and connecting trails.
  - b) Trail projects must be consistent with locally and regionally adopted master plans and general plans.
  - c) Trail projects must be consistent with the rights of private property owners.
  - d) Trail projects may not have a significant adverse impact on agricultural operations and environmentally sensitive areas and wildlife, including wetlands and other wildlife habitats.
- 2. To protect, restore, and enhance natural habitats and connecting corridors, watersheds, scenic areas, and other open-space resources of regional importance.

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3. To assist in the implementation of the policies and programs of the California Coastal Act of 1976 (Division 20, commencing with Section 30000), the San Francisco Bay Plan, and the adopted plans of local governments and special districts.
  4. To promote, assist, and enhance projects that provide open space and natural areas that are accessible to urban populations for recreational and educational purposes.
- C. Any acquisition of real property by the Coastal Conservancy shall be from willing sellers. This restriction does not extend to other public agencies that may receive funding through the San Francisco Bay Area Conservancy Program, unless the land to be acquired is actively farmed or ranched.

**Programmatic Criteria**

- A. Pursuant to Section 31163(d) of the Public Resources Code, the San Francisco Bay Area Conservancy Program shall provide for:
- development and acquisition projects
  - urban and rural projects
  - open space and outdoor recreation projects
- B. Funds may be used for the planning and/or implementation of eligible projects.
- C. Additional specific programming criteria may apply based on Program funding sources, purposes and amounts.

**Projects Evaluation Criteria**

- A. **To what extent is the project supported by adopted local or regional plans?**
1. Is the project specifically called for in an adopted city, county, or special district General Plan, Specific Plan or Master Plan, the plans and policies for the region which have been adopted by regional, state or federal agencies, or the plans and policies of joint powers agencies or cooperative ventures involving public, nonprofit and/or private entities?
  2. If not specifically called for in an adopted plan or policy, is the project consistent with those plans and policies?
  3. Is the project in conflict with any aspects of any adopted plan or policy?
  4. Have affected local jurisdictions adopted resolutions of support?

**B. To what extent does the project involve multiple jurisdictions or serve a regional constituency?**

1. Are multiple jurisdictions involved in the project?
2. If only a single jurisdiction is involved in the project, does the project have regional significance, either because of the resource involved or because of connections to other areas?
3. Does the project cross jurisdictional lines or connect existing protected lands or trails owned and/or maintained by different agencies or organizations?
4. Does the project protect a resource whose effective protection requires cooperative actions involving multiple agencies and organizations, and where implementation of the project will support or encourage such cooperative actions?
5. Does the project provide or support a recreational opportunity that will serve residents from multiple jurisdictions or region-wide?
6. Does the project provide a benefit for low-income, disabled, or ethnic populations that have been historically excluded from or otherwise unable to enjoy the region's open space lands?
7. Does the project have demonstrated support and involvement from a diverse cross section of the community it is intended to serve?

**C. Can the project be implemented in a timely way?**

1. Does the project have, or have the reasonable potential for obtaining in a timely way, any necessary permits, approvals, or environmental reviews?
2. Does the project have, or have the reasonable potential for obtaining in a timely way, all the funding needed for the full project, or a useful portion or segment of the full project?
3. Do the project sponsors have the organizational capacity to carry out the project?
4. Is there a public agency or private organization that is willing and able to perform needed long-term management, maintenance and monitoring?
5. Does the project utilize methods and technologies which are understood and have a high probability for success?
6. Is there a willing seller with clear legal title?
7. If the project is for planning purposes, does the project sponsor have the necessary expertise and capacity?



**D. To what extent does the project provide opportunities or benefits that could be lost if the project is not quickly implemented?**

1. What is the risk of the affected resource being lost to development or irreversible exploitation if the project is not quickly implemented?
2. Does the project take advantage of circumstances, such as other funding, bargain sales, or regulatory requirements, that are only available for a limited time and could be lost if the project is not funded?
3. Does the project benefit an endangered or threatened species whose long-term health and survival would be adversely affected if the project is not quickly implemented?
4. Does the project restore or otherwise correct unsafe conditions (such as polluted waterways resulting in contaminated fish and shellfish) that have an adverse affect on human or animal health?
5. Does the project present an opportunity to demonstrate a new technique or approach in which quick implementation would have immediate and significant benefits for other potential projects?
6. Does the project take advantage of opportunities to eliminate or reduce long-term threats to resource values?

**E. To what extent does the project include matching funds from other sources of funding or assistance?**

1. Does the project have matching funds, or a realistic plan to obtain funds, from sources other than the San Francisco Bay Area Conservancy Program?
2. Does the project include in-kind match in the form of skills, time, materials, or other support?
3. Do the project's sources of matching funds demonstrate a diverse base of support?
4. Would Program support improve the viability or quality of the proposed project, or simply replace other available support (such as when the project is already required as mitigation for another activity, or when Program funds just allow the applicant to shift other available funding to other purposes)?



## ***PROJECT SELECTION CRITERIA AND GUIDELINES***

(Adopted January 24, 2001)

### **REQUIRED CRITERIA**

- **Promotion of the Conservancy's statutory programs and purposes**
- **Consistency with purposes of the funding source**
- **Support** from the public
- **Location** (must benefit coastal resources or the San Francisco Bay region)
- **Need** (desired project or result will not occur without Conservancy participation)
- **Greater-than-local interest**

### **ADDITIONAL CRITERIA**

- **Urgency** (threat to a coastal resource from development or natural or economic conditions; pressing need; or a fleeting opportunity)
- **Resolution of more than one issue**
- **Leverage** (contribution of funds or services by other entities)
- **Conflict resolution**
- **Innovation** (for example, environmental or economic demonstration)
- **Readiness** (ability of the grantee and others to start and finish the project timely)
- **Realization of prior conservancy goals** (advances previous Conservancy projects)
- **Return to Conservancy** (funds will be repaid to the Conservancy, consistent with the Conservancy's long-term financial strategy)
- **Cooperation** (extent to which the public, nonprofit groups, landowners, and others will contribute to the project)



## ***Applying and Meeting Requirements for Coastal Conservancy Grants: Supplementary Information***

The "Request for Grant Proposals" information sheet provides important information about what is expected from the grantee in addition to the submission of a grant application. The following provides more detail about the **typical** process and possible associated costs and time commitment.

### ***Generic Sequence of Activities After Submitting a Grant Application to the San Francisco Bay Area Conservancy Program***

1. Bay staff reviews and ranks applications to establish priorities for funding (see application for description of selection process). All projects must be authorized for funding by the governing board of the Coastal Conservancy (Board). Selected high priority projects may be presented to the Board as early as a few months after grantee is notified, or later depending on the project's readiness, urgency for funds, and availability of Conservancy staff.
2. A Conservancy Project Manager is assigned to the proposed project. He/she will contact the grantee to learn more about the project and arrange for a tour of the project site, if appropriate. The Project Manager will be the grantee's main contact at the Conservancy from the beginning to the end of the project.
3. The Project Manager writes a detailed Staff Recommendation (Staff Rec) for the Board's consideration, and includes letters of support gathered by the grantee as an exhibit to the report. The Staff Rec is reviewed by several Conservancy staff members, including the Regional Manager, an attorney, and the Executive Officer. An editor makes final preparations for each Staff Rec's inclusion in a bound book that is sent to all Board members two weeks prior to a board meeting.
4. Board meetings take place about ten times each year and are held at various locations around the state. For each project, the Project Manager will make a brief presentation to the Board members, usually followed by a presentation by the Grantee. The Board generally votes on staff's recommendations at this same meeting.
5. Following Board approval, the Project Manager prepares a draft Grant Agreement. This Agreement is legally binding and includes requirements of the grantee and information about how and when funds can be disbursed. The draft Agreement is reviewed by the Program Manager, a Conservancy attorney, and the Conservancy's contracts office. It can also be sent in draft form to the grantee. The process required to prepare and mail out a final agreement usually takes at least three weeks. Five copies of the final Agreement are sent to the grantee for signatures, and all five are sent back to the Conservancy. The Executive Officer signs each copy and one fully executed copy is sent back to the grantee.

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It is important that the person administering the project for the grantee be familiar with the procedures and requirements of the agreement. It may be useful for the grantee to arrange a meeting with the Project Manager early in the project to review agreement conditions.

6. The Grant Agreement requires the grantee to prepare additional documents for the Executive Officer's review and approval before the project may begin (or, at least, before the parts of the project for which the Conservancy will be asked to provide reimbursement may begin). Typical accompanying documents include:

- a work program that includes a budget and schedule of tasks to be completed
- the names, titles, and pay rates of subcontractors, if any
- a plan for signs acknowledging the Conservancy's contribution to the project
- verification of adequate insurance
- a resolution from the grantee's governing board
- other legal documents that may require notarized signatures and recording

For projects involving the acquisition of property or conservation easements, appraisals, title documents, escrow instructions, and other documents will be required. Coastal Conservancy *Environmental Appraisal Specifications* are available from Conservancy staff.

7. Once the Project Manager has received and the Executive Officer has approved all of the required additional documents and the Grant Agreement has been signed, the Project Manager will provide a written approval for the project to commence.
8. Invoices can then be sent to the Conservancy for reimbursement of tasks specifically agreed upon in the Grant Agreement and its accompanying documents. A completed "Request for Disbursement" form (provided by the Project Manager, along with an instruction sheet) serves as an invoice. The invoices will be reviewed by the Project Manager and the contracts office. Payment will be mailed to the grantee usually within three weeks after the invoice is found to be complete. *Generally, the Conservancy is required to withhold ten percent of invoiced amounts until the project is satisfactorily completed.*
9. At project completion, the grantee submits a final invoice for remaining project costs and withheld amounts along with a final summary report of the project. For acquisition projects, the request for disbursement is sent to the Conservancy and when all acquisition documents have been approved by the Executive Officer and escrow conditions met, the warrant is sent to and paid out of escrow. Upon the Project Manager's assessment that all requirements of the Grant Agreement have been met, the agreement is closed.

*Non-Reimbursable Expenses:* Expenses incurred before the contractual agreement with the Conservancy is completed are not reimbursable. Such expenses should be discussed with the Project Manager early in the application and agreement preparation phase if pre-agreement costs will be a problem for the grantee.

*Other Time Commitments*

1. Staff Recs usually include letters of support. Normally, the grantee takes responsibility for requesting and securing letters of support, including letters from key legislators.
2. A brief narrative explanation of project progress should accompany invoices.
3. The Project Manager will call or meet with the grantee from time to time to assess project progress.